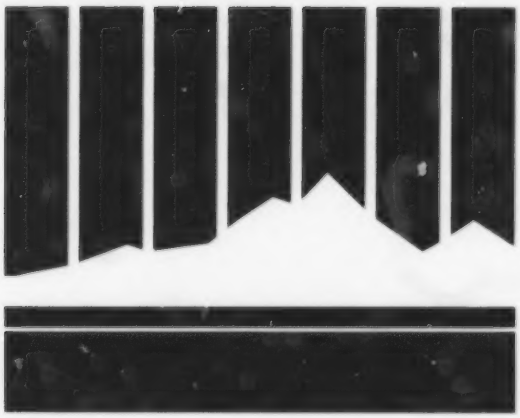
YUKON TOURISM INDUSTRY



HIGHLIGHTS REPORT
1987 and 1988

Yukon
The Magic and the Mystery...

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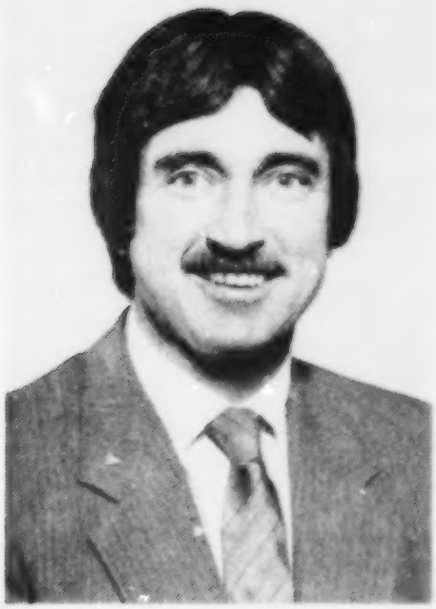

Minister's Comments

This review of the Yukon tourism industry's activities in 1987 and 1988 shows significant developments for tourism. Initiatives of the industry and the federal and territorial governments have established a strong foundation that will improve the ability of our industry to meet the challenges and to respond to the opportunities of Yukon tourism.

On behalf of the Department of Tourism, I want to give special thanks to all those who contributed to the preparation of this Yukon Tourism Industry Highlights Report and to the creation of the initiatives mentioned in it.

Art Webster,
Minister of Tourism

April, 1989

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I. INTRODUCTION

This Yukon Tourism Industry Highlights Report is the seventeenth such report prepared annually by the Yukon Department of Tourism to review industry and visitor activities during the territory's four month peak tourism season from June through September. Previous reports have presented a statistical review of these activities for the calendar year. Beginning in the 1986 Tourism Industry Highlights Report this format was modified to incorporate more narrative.

In 1987, the Department arranged for the Yukon Bureau of Statistics to conduct the Yukon Visitor Exit Survey, which reduced the need to include comprehensive statistics in the Highlights Report. This Survey is the first statistically sound, definitive survey of visitors to the Yukon during the peak summer tourism season.

As well, in 1987, the method for collecting Yukon border statistics was modified to provide a better profile of Yukon visitors and replaces data collected previously.

In order to incorporate the information provided by these new statistical processes, the Department delayed preparation of a Tourism Industry Highlights Report for 1987.

This year's Report concentrates on providing an overview of the major activities and accomplishments by the Yukon's tourism industry as well as by the Department of Tourism in both 1987 and 1988.

A summary of the results of the 1987 Yukon Visitor Exit Survey and of the new border crossing data is also included.

More detailed information on the tourism industry can be obtained by writing the Yukon Department of Tourism at Box 2703, Whitehorse, Yukon, Y1A 2C6 or by phoning 403-667-5449.

II. EXECUTIVE SUMMARY

Tourism is considered one of the more significant and stable sectors of the Yukon economy. Since 1985 when the work of preparing an overall Yukon Tourism Development Strategy began, increasing emphasis has been placed on developing the Yukon's tourism potential.

Several major initiatives were undertaken and completed in 1987 and 1988 to establish a strong framework for the future development of tourism in the Yukon. Many of these initiatives involved industry and government cooperation to strengthen the Yukon's ability to attract visitors in an increasingly competitive marketplace.

In 1988, the Yukon Tourism Action Plan was released, providing an indication of the government's ongoing and future priorities for tourism. It identified key initiatives in the areas of:

- training and human resource development,
- market and consumer research,
- product development, and
- marketing.

Changes occurred within the tourism industry. The Yukon Visitors' Association was renamed the Tourism Industry Association of the Yukon. The membership of the Association was broadened to include all of the key tourism industry-related associations, giving the Association a stronger role as the voice of the tourism industry.

New industry initiatives in marketing in the United States and in providing tourism training courses in the Yukon were planned.

An extensive review and restructuring of the Department's tourism literature was undertaken.

Individual communities throughout the Yukon prepared new promotional brochures, expanded their museums and built new facilities and attractions to better serve the interests of Yukon visitors.

Many of these initiatives were funded through the Canada-Yukon Tourism Sub-Agreement sponsored by the federal and Yukon governments on a cost-shared basis of 80% and 20%, respectively.

Joint industry-government initiatives were continued and realigned to meet changes in the international tourism marketplace. The Yukon Cooperative Marketing Committee was renamed the Yukon Tourism Marketing Council and a stronger voice was given to the industry representatives on the Council in providing advice on the Department's programs and expenditures on marketing.

The Development, Heritage and Marketing Branches of the Department of Tourism continued to provide a wide range of programs to meet the needs of the tourism industry and of Yukon visitors and to protect the Yukon's heritage resources. Many new initiatives were also undertaken. Four regional tourism plans were undertaken by the Development Branch with the assistance of the communities affected. A major study on museum development was done by the Heritage Branch.

The Marketing Branch undertook a Tourism Mission to Japan and instituted a new visitor FM radio network throughout the territory.

Research and data collection methods were refined and upgraded with the preparation of the 1987 Yukon Visitor Exit Survey and the border crossing statistics which provided more accurate tracking of the movement of visitors to the territory.

The Visitor Exit Survey showed that 193,700 individuals visited the Yukon during 1987 from June 1 to September 30 and spent an estimated $37 million on direct expenditures not associated with pre-arranged tour costs. These visitors stayed an average of 4.3 nights. Their country of origin was: 79% American, 17% Canadian, with 4% coming from other countries.

Changes to Yukon border crossing statistics in 1987 to separate the travel of Yukoners meant a better assessment of the crossings made by visitors.

Comparing these border crossing statistics for 1987 and 1988, the 1988 tourism season reflected a 9.3% decline in the total number of visitors crossing Yukon borders. Many factors affected this decline.

Some of the key factors included the smaller number of cruise ship passengers disembarking at Skagway, Alaska, which meant a loss of bus tour traffic to the Yukon.

As well, the White Pass and Yukon Railway resumed operations only as far as the U.S./Canada border, resulting in a substantial drop in visitors to Carcross on one-day bus excursions.

Heavy rains washed out portions of the Alaska Highway in July, 1988 and the reporting of this around North America deterred potential visitors.

Overall, the 1987 and 1988 tourism seasons were busy ones. Despite the downturn in 1988, the industry's outlook remained positive. The planning and diversification efforts in 1987 and 1988 of the industry, and of the federal and Yukon governments, had set the Yukon's tourism industry on a new course, strengthening its ability to respond to changing market trends and to capture a larger share of the Yukon's markets.

III. CREATING A FRAMEWORK FOR YUKON TOURISM

Yukon Tourism Action Plan

In July, 1988, the Yukon Tourism Action Plan was released. This was the culmination of a three year consultative process between the tourism industry and the Yukon Department of Tourism to develop a strategy and an action plan to guide future priorities, programs and activities. (Details of the Yukon Tourism Development Strategy are found in the 1986 Tourism Industry Highlights Report.)

Building upon the Yukon Tourism Development Strategy's primary goals to emphasize growth markets and service continuing markets, the Yukon Tourism Action Plan set out several key objectives to:

- generate optimum visitor expenditure in the Yukon;
- create an economic climate which will stimulate private sector investment in the tourism industry in the Yukon;
- create the maximum number of long-term, career-oriented job opportunities for all Yukoners;
- develop and diversify new tourism products;
- identify and implement relevant professional training programs for people in the tourism industry;
- integrate Indian tourism development within the territory; and

- target Yukon products at potential visitors to generate the highest gross travel expenditures, market size and potential for growth.

The Yukon Tourism Action Plan also outlined specific priorities beyond 1990 and stressed the importance of identifying the Yukon's markets for tourism. Two key markets were identified: independent R.V./auto travellers and bus tour travellers.

The Action Plan noted how the results of the 1987 Yukon Visitor Exit Survey, which are profiled in section 5 of this Tourism Industry Highlights Report, will be used to further identify market segments, visitor activities and development opportunities.

The guiding criteria for determining the activities included in the Yukon Tourism Action Plan was that they be focussed on giving the Yukon's customers what they want.

The activities identified in the Tourism Action Plan fall under four main categories.

Training and Human Resource Development:

Initiatives are planned to identify ongoing training needs. The Department of Tourism, the private sector, the Tourism Training Institute, Yukon College, the Council for Yukon Indians and individual Indian bands will be working together to identify these needs, develop curricula and deliver appropriate training.

Market and Consumer Research

Market and consumer research information will continue to be provided by Department of Tourism to

help the private sector make informed investment decisions and to help government and the private sector prepare and implement development and marketing initiatives.

The Department of Tourism will work with private sector operators, owners, entrepreneurs, the Tourism Industry Association of the Yukon, the Yukon Tourism Marketing Council and other government departments regarding these research programs.

Product Development

The development of unique and varied tourism products will be continued as a key component of a successful tourism industry in the Yukon. The participants in these developments will be private sector entrepreneurs and investors, the federal and Yukon governments, Yukon communities, Indian bands and the Yukon Indian Development Corporation.

Marketing

Marketing initiatives to create a positive image of the Yukon in the minds of potential visitors and to draw them to spending time in the Yukon will be continued as a critical aspect of the Yukon Tourism Action Plan. Actions for tourism marketing involve all levels of government, communities, Indian bands, industry sector associations, chambers of commerce, organizers of events and attractions and all the Yukoners who meet, greet and service the Yukon's visitors.

For further details about the Yukon Tourism Action Plan, copies can be obtained from the Department of Tourism.

IV. Taking Action

Industry Initiatives

As noted in the preceding section on the Yukon Tourism Action Plan, all sectors of the tourism industry are essential partners in the development of tourism in the territory. Governments provide support for private sector initiatives, but the lead role and initiatives must come from the private sector.

Many new initiatives were undertaken by the Yukon's tourism industry in 1987 and 1988. Significant highlights of these initiatives are noted below.

Where appropriate, funding sources are identified. Projects funded under the terms of the Canada-Yukon Tourism Sub-Agreement are identified by an * to avoid repetition. Details of this agreement are found in the information on Joint Initiatives.

Tourism Industry Association of the Yukon

In May, 1987, one of the main tourism industry associations, the Yukon Visitors' Association, was reorganized to broaden its membership base.

Permanent seats on the board were provided for representatives of the following organizations:

- Council for Yukon Indians,
- Federation of Yukon Wilderness Outfitters,

- Klondike Visitors' Association,
- Kluane Country Visitors' Association,
- Silver Trail Tourism Association,
- Yukon/B.C. Hotels Association,
- Yukon Chamber of Commerce,
- Yukon Historical and Museums Association,
- Yukon Indian Development Corporation, and
- Yukon Outfitters' Association (Big Game).

This broader-based organization, which was renamed the Tourism Industry Association of the Yukon (TIAY), has gained government recognition as the voice of the Yukon's tourism industry. While many of the major activities of this Association are covered in the information on Joint Initiatives, some of its specific activities during 1987 and 1988 included:

- In 1988, agreement was reached that funding be provided to the TIAY to introduce a $600,000 advertising campaign in the U.S. market in 1989 which would for the first time begin to position the Yukon as a destination.*

- The Yukon Tourism Training Institute was established in 1988. The board of the Tourism Industry Association of the Yukon was given the lead responsibility for working with Yukon College and other interested organizations in the creation of appropriate tourism training courses in the Yukon.

  Consideration was given to doing an industry-driven needs assessment before proceeding with the development of new tourism training courses to ensure they are based upon the realities of the Yukon's peak summer tourism season.

- In 1988, the funding agreement with the Yukon government for the Convention Program operated by the TIAY was renegotiated.

- The TIAY's Convention Marketing Plan was refocused in 1988 to make better use of the Yukon's own promotional network by encouraging local people involved in national or international associations to promote the Yukon as a possible convention site.

- Research was undertaken in 1988 into the potential to develop a convention center in Whitehorse and to survey the projected needs for future visitor accommodation. This research was sponsored by the TIAY, the B.C./Yukon Hotels Association and the City of Whitehorse.*

- The TIAY annually participates in major consumer shows. In 1987, they participated in consumer shows in San Francisco, Toronto, Winnipeg, Regina, Edmonton and Calgary. In 1988, they were involved in the Toronto Sportsmen Show, The Anaheim R.V. Sportsmen and Travel Show and the Vancouver Recreational Vehicle and Outdoor Show.

- Following up on a resolution passed at its 1988 annual meeting, the TIAY began to review the possibility of establishing a rating system for hotels and accommodation in the Yukon.

- In 1987, the TIAY sponsored an event in late August and early September to help extend the tourism season. This event was the Alaska Highway Square Dance Jamboree in which square dances and special events are held in Watson Lake, Whitehorse, Carcross, Minto, Mayo, Dawson City and Haines Junction as well as several places in Alaska.*

- Another event, sponsored by the TIAY since 1983, is the Klondike Trail of 98 Road Relay which takes place between Whitehorse and Skagway.

Additional tourism-related activities in 1987 and 1988 initiated by the other organizations included:

- In 1988, the Council for Yukon Indians (CYI) produced a 15 minute video focussing on native participation in the Yukon's tourism industry.* Excerpts of this video will be included in the laser disc presentation being used in the Department of Tourism's visitor reception centres.

  On a short-term basis, the CYI received funding for a Tourism Coordinator position to support increased involvement by the Yukon's Indian people in the tourism industry.*

- The Yukon Indian Development Corporation (YIDC) conducted a feasibility study in 1988 with regard to the possibility of establishing an Indian restaurant in Whitehorse.

  As well, in 1988, the YIDC received funding from the Department of Indian and Northern Affairs to sponsor a Youth Entrepreneurship Training Program. An individual from Old Crow who proposed the development of a wilderness tour in Old Crow is now receiving training in how to create and run this business.

- In 1986, the Yukon Outfitters' Association (YOA) received funding to complete a marketing plan for the big game sector of the tourism industry. This plan was completed in 1987.*

In 1987-88, an insert for a marketing brochure was prepared and media advertisements were placed in 20 European and North American sporting and hunting magazines.*

- In 1987, the Yukon Outfitters' Association; the Federation of Yukon Wilderness Outfitters; the Departments of Education, Renewable Resources and Tourism; and Yukon College began to develop a wilderness guide training course. Currently, work is ongoing to prepare the curriculum for such a course.*

- The Yukon Federation of Wilderness Outfitters (YFWO) began developing a joint marketing program with the Department of Tourism in 1986. Implemented in 1987 and in 1988, this program included the production and distribution of outdoor adventure brochures and media advertisements in up-scale outdoor and consumer travel magazines in Canada and the U.S. In 1987, the YFWO also participated in three consumer shows in California, Texas and Ontario.

Regional Initiatives

This section provides a regional perspective on the major initiatives taken by industry associations, private businesses, Indian bands and local governments during 1987 and 1988.

During this time, most of Yukon's tourism regions undertook new initiatives ranging from preparing new marketing programs, development plans and promotional brochures, to building new attractions and facilities.

Some of these regions, such as the Whitehorse/South Alaska Highway Area and the Dawson area, were already well established in their approaches to tourism. Others were just beginning to focus on the tourism potential of their areas.

The vast majority of the actions noted below were funded under the Canada-Yukon Tourism Sub-Agreement (CYTSA). An * indicates an activity receiving CYTSA funding.

Please refer to the Joint Initiatives and Departmental Initiatives sections of this Report for more information on the government programs mentioned.

Whitehorse/South Alaska Highway Area (Whitehorse, Teslin)

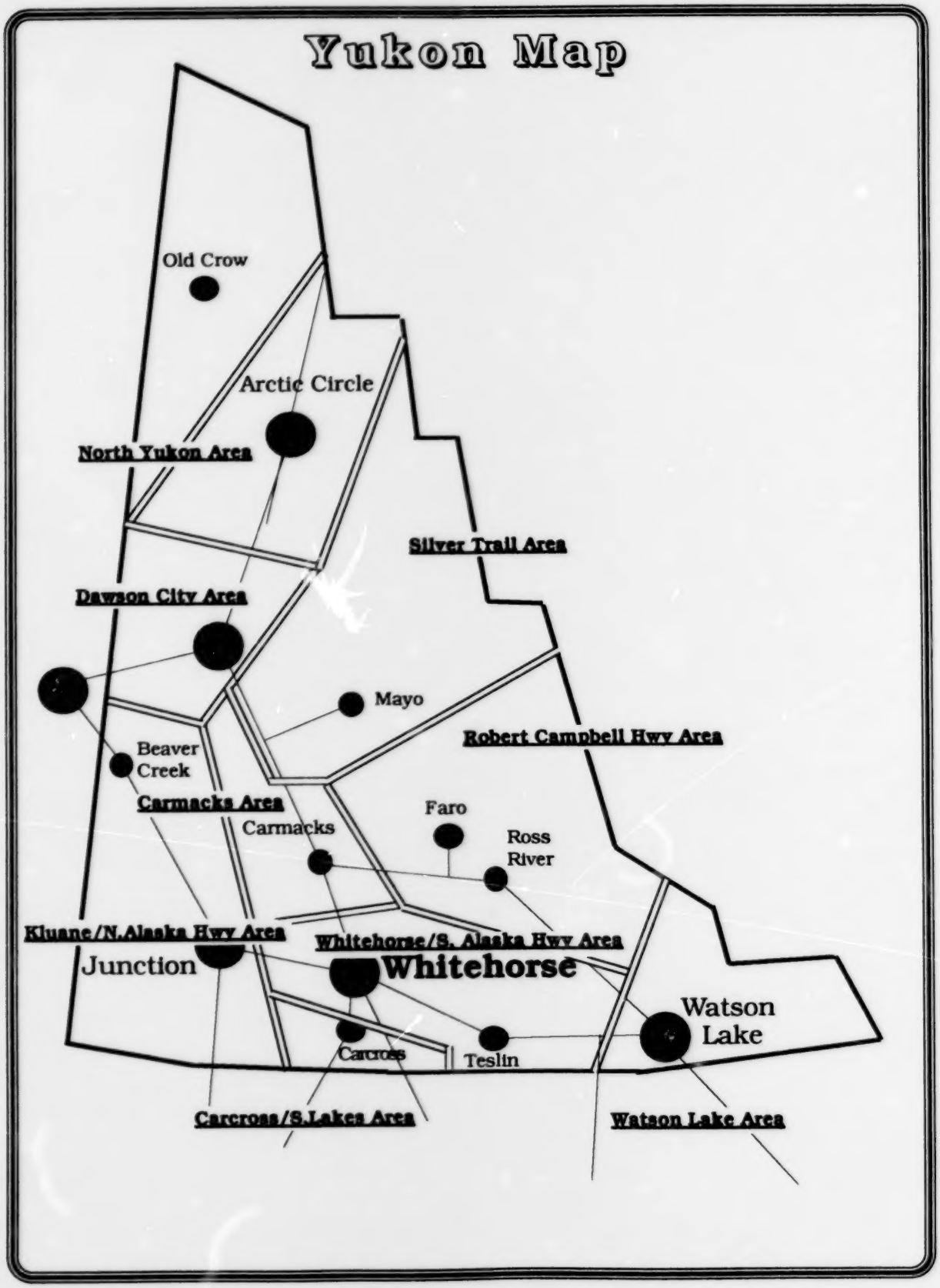
In 1987 and 1988, the City of Whitehorse participated in the South East Alaska Cooperative Marketing Program to promote Whitehorse as a tourist destination.*

Changes were also made to Whitehorse's two operating museums. Beginning in 1987, the MacBride Museum in Whitehorse started planning an expansion to its facilities. A major exhibit upgrading was completed in 1988.

The Old Log Church Museum conducted an engineering study in 1988 to review some of the Church's structural problems and to propose options. As well, planning was begun for a Yukon transportation museum in Whitehorse.

In 1988, the construction of the M.V. Anna Maria was completed on Vancouver Island and the river boat was transported to Whitehorse. Beginning in the 1989 summer tourism season, the M.V. Anna Maria will be offering river boat tours between Whitehorse and Dawson City.*

Yukon Map


Old Crow
Arctic Circle
North Yukon Area
Silver Trail Area
Dawson City Area
Mayo
Robert Campbell Hwy Area
Beaver Creek
Carmacks Area
Carmacks
Faro
Ross River
Kluane/N.Alaska Hwy Area
Junction
Whitehorse/S. Alaska Hwy Area
Whitehorse
Watson Lake
Carcross
Teslin
Carcross/S.Lakes Area
Watson Lake Area

Sha Tan Tours, based in Whitehorse, was established in 1988 by the Champagne-Aishihik Indian Band to assist members interested in guiding wilderness tours. Two employees were trained in how to develop, promote and sell these types of tours. Brochures were prepared and distributed. Nine different wilderness tours have been arranged and will be available in 1989.*

In 1987 and 1988, the facilities of three of Whitehorse's larger hotels were expanded. The Yukon Inn added 52 rooms and the Gold Rush Inn added 40 rooms. The Edgewater Hotel added 18 new rooms. These hotels also upgraded and renovated many of their existing rooms.*

In 1988, the scope of the 22 acre Yukon Gardens attraction was expanded with the addition of Old MacDonald's Farm, an animal petting farm for small children.*

Teslin completed its socio-economic, physical and recreation planning in 1987 and this information was included in their revised community plan completed in 1988.

Teslin also participated in the Department of Tourism's Streetscape program to upgrade the downtown areas of Yukon communities. The planning and design phases of this program were completed in 1988 with proposed development projects to include marina area site improvements, a picnic shelter, welcome signs and information panels.

Dawson City Area
(Dawson City)

For the Dawson City area, several new activities were initiated in 1987 and 1988.

In 1988, the Dawson City Museum completed development and construction of its South Gallery exhibit.

The planning process for landscaping the grounds of the restored Old Territorial Administration Building was also begun in 1988.

The Klondike Visitors' Association (KVA) was responsible for a number of new activities during this time:

- In 1987, a promotional pamphlet about Dawson City was prepared for distribution at the Department of Tourism's visitor reception centres and in tourist information packages.*

- The construction of the Jack London Interpretative Center was completed and, with the purchase of Dick North's Jack London exhibit, was opened for public viewing in 1987.*

- The ongoing restoration of the Odd Fellows Hall continued in 1987 and 1988. Upon completion, this building will provide office space for the KVA and other non-profit organizations. A community hall will be located there as well.*

- The KVA's promotional marketing campaign in Alaska received funding for its second and third years of operation in 1987 and 1988, respectively. This campaign represents the Yukon's sole marketing presence in Alaska which is an important source of visitors to the Yukon.*

- In 1987, the calendar of events occurring in Dawson City was expanded with the addition of the Klondike Mixed Slow Pitch Baseball Tournament and the Klondike International Dart Tournament.

- In 1988, the KVA began operating with three full-time staff to support the organization on a year-round basis.

Also during 1987 and 1988, a mini golf course was developed, Dawson City's ski hill was upgraded and an 11 room expansion and general upgrading occurred at the Triple J Motel.*

As well, in 1988, the preparation of a booklet about the history and culture of the Han people, the area's aboriginal people, was begun by the Dawson Indian Band. This booklet will be available in 1989 for distribution at all Yukon visitor reception centres and used in Yukon schools as part of the curriculum in native studies.*

Kluane/North Alaska Highway Area
(Burwash Landing, Haines Junction, Beaver Creek, Destruction Bay, Champagne, Klukshu)

In 1987 and 1988, the Kluane Country Visitors' Association began to actively refocus some of its tourism activities to build upon the area's strong tourism potential.

During 1987, 35,000 copies of a regional brochure were printed to promote the area.*

In 1988, a marketing strategy for the Kluane region was done which provided a market overview, comprehensive recommendations to 1990 and a financial strategy for the Association.*

Following this strategy, the name of the original association, the Alaska Highway Visitors' Association, was changed in the fall of 1988 to the Kluane Country Visitors' Association. Other plans include preparing a regional development guide in 1989 and making changes to highway signs throughout the region.

The overall approach is to develop this region as a destination for visitors instead of having them just travel through the area on their way to or from Alaska.

In conjunction with this approach, in 1988, the Department of Tourism began developing a new Kluane tourism development plan. This initiative will be coordinated closely with the Yukon Land Use Planning Process in the Kluane region. The information in the Kluane tourism development plan will assist the Department in providing input to the federal government's review of the Kluane National Park Management Plan.

The Kluane Museum of Natural History, located in Burwash Landing, began phase I of its exhibit upgrading and development project in 1988.*

During 1987 and 1988, Haines Junction, one of the larger communities in this region, participated in the Department's Streetscape program and received funding for various community improvement projects such as landscaping, street banners and signs, community signs, information panels, a monument and a village square/meeting place.

Beaver Creek, Burwash Landing and Destruction Bay also received funding under the Streetscape program for the planning and design of similar projects for their communities and began to develop them in 1988.

In addition to these improvements, in 1988, the Kluane R.V. Campground was constructed and began limited operations. It is expected to be fully operational in 1989.*

As well, in 1988, the Champagne/ Indian Band conducted a feasibility study on options for a major resort in the area. The study recommended construction on Kathleen Lake and an investment package was prepared to seek joint venture participation in the development of the Matatana Resort at this location.*

Another feasibility study conducted by the Champagne/Aishihik Indian Band during this timeframe was to consider building a tramway up Paint Mountain.*

In 1988, the communities of Champagne and Klukshu began their Streetscape programs and were given funding to begin planning and designing their community improvements.

Watson Lake Area
(Watson Lake, Upper Liard)

The need to develop the accommodation base in the Yukon's gateway community of Watson Lake has been recognized for several years. Various projects have occurred in recent years with some major developments taking place in 1987 and 1988.

For example, both the Belvedere and Gateway Hotels received funds to assist them in improving their facilities. The Belvedere Hotel added 32 rooms and the Gateway Hotel added 13 new rooms. As well, the Lakeview (Downtown) R.V. Campground underwent a small expansion and upgrading.*

At Watson Lake, a Canteen Show premiered in 1988, providing visitors with a dinner-theater show highlighting the building of the Alaska Highway.*

In 1988, a local museum committee was established in Watson Lake and, with the support of the Department of Tourism, was involved in determining whether to build a museum in that community.

Watson Lake began its Streetscape activities in 1985. In 1987 and 1988, numerous projects were undertaken with some of the major ones being: sidewalk and trail construction; road side pulloffs; new signs, flags and banners;

and acquisition of Watson Lake's original fire engine. The community is currently constructing a full scale replica of an authentic military aircraft from the second World War.

In 1987, the Department of Tourism began working with Watson Lake to develop a regional tourism development plan. This plan is to be completed in 1989.

Upper Liard began the planning and design phase of its Streetscape program in 1987 and started developing various projects in the community in 1988.

Carcross/Southern Lakes Area
(Carcross, Tagish, Atlin)

Carcross began the planning phase of its Streetscape program in 1986. In 1987, Streetscape development projects in the community included the provision of boardwalks and picnic tables as well as upgrading the day-use area. In 1988, completed projects included community artwork and footbridge repairs.

Nares Boat Tours, a company providing tours of Bennett Lake and fishing excursions, was given funding to improve its accommodation facilities.*

Robert Campbell Highway Area
(Carmacks, Faro, Ross River,
Pelly Crossing)

In 1988, Department of Tourism began working with the communities of Carmacks, Faro and Ross River to establish a process for preparing a regional tourism development plan for the Robert Campbell Highway area. This plan is to be completed in 1989. It will be coordinated with ongoing community planning in Carmacks and Faro and the proposed community tourism plan for Faro.

In 1988, several new tourism-oriented signs were installed in Faro.

In 1988, Carmacks began the planning phase of its Streetscape program.

In 1987, the Selkirk Indian Band requested that Pelly Crossing begin its Streetscape planning and design in conjunction with the community plan being prepared at that time. The Streetscape planning phase was completed in 1988 and initial development work began to erect welcome signs and information and artwork panels.

As well, in 1988, the Carmacks-Little Salmon Indian Band conducted a feasibility study into the options for building an interpretive and cultural center in the Carmacks area.*

Silver Trail Area
(Keno City, Elsa, Mayo, Stewart Crossing)

In 1987, at the request of the Silver Trail Tourism Association, the Department of Tourism started preparing a regional tourism plan to help stimulate tourism in this area. The plan is scheduled for completion early in 1989.

The Silver Trail Tourism Association has actively marketed this region in recent years. In 1988, several projects were undertaken.

- The Silver Trail region brochure was updated and reprinted. A guidebook on the geology and environmental history of the Silver Trail was published and road signs put in place to coordinate with this guidebook.*

- The information booth at Stewart Crossing was upgraded, resulting in a 300% increase in visitors stopping at the booth, 1,000 in 1987 and 3,000 in 1988.

In 1988, the Silver Trail communities of Keno City, Elsa and Mayo began the planning and design phase of their Streetscape programs with development projects scheduled to begin in 1989.

Some of the annual events occurring in these communities are the Mayo to Keno Dog Mushers Annual Race, the Stewart Crossing Fishing Derby and the Keno City Demolition Derby.

North Yukon Area
(Dempster Highway, Old Crow)

In 1988, the Department of Tourism took lead responsibility on a project for the development of an interpretive strategy for the Dempster highway corridor.*

This strategy focuses on natural, historic and Indian cultural features of interpretive significance and provides various options for an overall approach. It will assist in the orderly long-term development of interpretive facilities, services and programs to ensure minimal environmental impact.

Planning for new tourism opportunities in the Old Crow area of the Yukon was underway in 1988. A wilderness tour is being developed by an individual currently involved in the Yukon Indian Development Corporation's youth entrepreneurship training activities.

As well, in 1989, Sha Tan Tours will be offering tours into the Old Crow area.

Joint Initiatives

Five major joint initiatives are presented in this Highlights Report on the Yukon tourism industry activities in 1987 and 1988. They are:

- Yukon Tourism Marketing Council, a cooperative initiative between the industry and the Department of Tourism.
- Alaska-Yukon Marketing Program, based on an agreement between the Yukon Department of Tourism, the Tourism Industry Association of the Yukon, the Alaska Visitors' Association and the Alaska Division of Tourism.
- Yukon Anniversaries Commission, a non-profit organization established to coordinate the celebrations associated with 50th Anniversary of the Alaska Highway and the Centennial of the Klondike Gold Rush.
- Tourism North Agreement, between the Yukon, Alaska and British Columbia governments.
- Canada-Yukon Tourism Sub-Agreement, a joint initiative put in place in 1985 between the federal and Yukon governments under the terms of the Economic Development Agreement.

Yukon Tourism Marketing Council

In 1987, the Yukon Tourism Marketing Council, formerly the Yukon Cooperative Marketing Committee, became an advisory body to the Minister of Tourism on the development and implementation of the Department's Tourism Marketing Program.

The major new feature strengthening industry's role on the Yukon Tourism

Marketing Council was the establishment of the Executive Director of the Tourism Industry Association as a co-chairperson with the Department's Director of Marketing.

This was a significant step in ensuring close cooperation between the tourism industry and the government since the Council makes recommendations on the use of all the Department's discretionary funds for tourism marketing.

Having industry and government co-chair this type of Council made the Yukon unique in Canada for the degree of industry-government cooperation achieved.

In 1987 and 1988, the Yukon Tourism Marketing Council was responsible for several major initiatives as well as for the continued re-evaluation of existing programs to ensure increased cost efficiency.

- A complete overhaul of the Yukon's tourism literature program took place. New brochures were developed and others were redesigned to upgrade quality and to meet consumer needs.

- Focus testing of this literature was done with groups representing a cross-section of visitor prospects.

- The current Klondike Fever Road Show was extended to an eight week program presenting 70 shows to an anticipated 10,000 people in retirement community R.V. parks in Arizona and California. Formerly the Road Show was a four week program.

- Planning was begun for the staging of Rendez-vous Yukon in June, 1989 as an international mini-marketplace.

With transportation assistance provided by Canadian Airlines International Limited, fourteen tour wholesalers from West Germany, Switzerland and Austria are being invited to the Yukon to meet with local tourism operators to discuss potential tour opportunities.

Alaska-Yukon Marketing Program

The Alaska-Yukon Marketing Program is an ongoing joint promotion involving the Department of Tourism, the Tourism Industry Association of the Yukon, the Alaska Visitors' Association and the Alaska Division of Tourism. This Program provides advertising opportunities for the Yukon in Alaska's major tourism publication, and includes a joint Canadian advertising campaign.

The Alaska-Yukon Marketing Program is conducted under the auspices of the Alaska Tourism Marketing Council. The Yukon Department of Tourism is a member of this Council.

In 1988, a review of the Yukon's participation in this program was undertaken and a new agreement reached.

This new agreement provided the Yukon with a more equitable, cost-shared arrangement that now enables the Yukon to reach up to 150,000 visitor prospects as compared to the 6,000 respondents to the Department's previous advertisement in Alaska's Travel Planner in 1987-88.

Yukon Anniversaries Commission

In 1987, an ad hoc committee began to establish general parameters for the coordination of celebrations in connection with the 50th Anniversary of the Alaska Highway and with the Centennial of the Klondike Gold Rush.

The membership of this committee included several former Yukon Commissioners and representatives from the Council for Yukon Indians, the Tourism Industry Association of the Yukon, the Yukon Historical and Museums Association, the Yukon Chamber of Commerce, Canadian Parks Service, Renewable Resources and the Department of Tourism.

Contact was also made with other relevant federal departments and the Alaskan and B.C. governments to obtain their support for efforts to coordinate these celebrations.

Based on input from this committee, the Yukon Anniversaries Commission was formed in 1988 to oversee preparations for these events. The Anniversaries Commission is a non-profit society which is a separate entity from government. The Commission will receive CYTSA funding for the first two years of its operation to hire staff and to open an office.

Tourism North Agreement

Following up on an agreement reached at the 1988 Heads of Government Meeting between Alaska, B.C. and the Yukon, a new cooperative marketing agreement was negotiated in 1988 and signed between these jurisdictions in early 1989.

This agreement, known as the Tourism North Agreement, laid a foundation for joint action to coordinate promotions relating to visitor use of the Alaska Highway. It also is designed to ensure continuity in planning for events after the completion of the 1992 Alaska Highway Anniversary Celebrations.

Canada-Yukon Tourism Sub-Agreement

The Canada-Yukon Tourism Sub-Agreement (CYTSA) is a joint undertaking by the two governments to improve and expand the Yukon tourism industry. It is one of four Yukon sub-agreements negotiated under the Economic Development Agreement. The CYTSA provides $10 million dollars for eligible tourism projects started during 1985-1989.

The main focus of the CYTSA is to assist businesses and industry organizations and to respond to needs identified by them.

The CYTSA is administered by a management committee of government and private sector representatives. While the Yukon Department of Tourism is the lead Yukon agency on this agreement, programs and projects are administered by the Business Development Office of the Yukon Department of Economic Development. The federal Department of Industry, Science and Technology implements larger private sector product developments.

Three programs are available under the Canada-Yukon Tourism Sub-Agreement.

The Tourism Industry Support Program provides strategic data and planning for the development of the tourism industry.

The Marketing Development Program provides assistance for the identification and development of high revenue generating markets for Yukon tourism products.

The Product Development Program is designed to stimulate the expansion and upgrading of existing tourism products. The aim is to develop high-quality, competitive tourism destinations which will increase the revenues earned by Yukon businesses.

For the 1986-87 fiscal year, CYTSA funding was provided for 32 projects, totaling $1,182,155. In the 1987-88 fiscal year, $1,555,921 was expended on 48 projects.

As of November, 1988 almost $7.4 million out of a possible $10 million has been committed. These funds are provided by the federal and Yukon governments on a 80% to 20% cost-shared basis, respectively. The current CYTSA expires on March 31, 1990, although no new project approvals may be made after March 31, 1989.

Most communities in the Yukon have participated in these projects and benefited from CYTSA funding.

More information on this program can be obtained from either the Yukon Department of Tourism or the federal Department of Industry, Science and Technology.

Negotiations for future joint funding programs will continue to take place in 1989.

Department of Tourism Initiatives

In addition to participating in the types of joint industry-government and intergovernmental programs noted previously, the Department of Tourism is also responsible for its own programs.

The Department creates and administers a wide-range of programs to promote and develop the Yukon as a tourism destination benefiting all Yukoners and to assist the private sector in similar efforts. Through these programs the Department also provides visitors and Yukoners with opportunities to gain an appreciation of the Yukon's heritage and strives to preserve these resources for present and future generations.

There are four branches in the Department. During 1987 and 1988, the Administration Branch continued to provide financial, personnel and administrative support to the other branches to assist them in achieving their objectives. The other branches maintained their ongoing programs and also initiated many new programs and activities to meet the changing needs of the tourism industry, locally and internationally.

Highlights of the 1987 and 1988 activities of the Development, Heritage and Marketing Branches follow.

Development Branch

The Development Branch encourages and supports development of the Yukon's tourism industry to foster regionally diversified economic growth.

It also provides the management function for the Department's involvement in the Canada-Yukon Tourism Sub-Agreement.

The Branch administers three main categories of activities: planning, programs and research.

Regional Tourism Plans

A major planning activity for the Development Branch is working with Yukon communities and tourism industry associations to prepare regional tourism development plans.

In 1987, regional tourism plans were begun for the Silver Trail and Watson Lake areas and in 1988, for the Kluane and Robert Campbell regions. These plans are scheduled for completion in early 1989.

Planning Activities

Other planning initiatives included the preparation of:

- the Yukon Tourism Development Strategy and the Yukon Tourism Action Plan previously mentioned.
- a joint study with Renewable Resources to develop a planning framework to determine road access for recreational activities along a 10 km corridor on each side of publicly maintained roads and highways.
- the Dempster Highway Corridor Interpretive Strategy to begin determining how to present points of interest along the Dempster Highway. The Strategy is part of the Department's input into the broader Dempster Highway Corridor Management Plan.

Streetscape

The Branch is also responsible for managing the Streetscape program. This program was initiated in 1986-87 to provide two phases of financial assistance to designated communities to make their downtown areas more attractive to visitors. Phase one covers planning and design costs and phase two covers actual development costs.

Three communities had completed both the design and development phases of their Streetscape programs in 1988. In 1987, six new communities began the planning and design phase of their Streetscape programs. In 1988, these same six communities began the development phase of their Streetscape programs and five new communities entered the planning and design phase of their Streetscape programs. Details of these activities are listed under Regional Initiatives.

Whitehorse Visitor Reception Centre

In 1987, the Development Branch began to examine alternate sites for the location of the Whitehorse Visitor Reception Centre. It was decided that further study of this possibility was required which would ensure greater public consultation and review a wider range of options. The final report is due in early 1989.

Special Events

The Development Branch also manages a Special Events Program to provide financial assistance to organizers and sponsors of events which have significant impact on Yukon tourism and are instrumental in attracting visitors to the territory. The focus is on special, cultural, recreational or sporting events.

In 1987, 32 special events were funded and, in 1988, 45 special events received funding. The level of funding ranged from $500 for the Model T Club of Texas sponsored by Watson Lake to $5,000 for the Canadian National Biathlon Championships. Events were approved for nearly every community.

Research

The Branch is also responsible for monitoring and evaluating the performance of various marketing efforts as well as collecting and analyzing Yukon tourism statistics. Often, this work is done in concert with the Yukon Bureau of Statistics.

A major research project in 1987 was the Yukon Visitor Exit Survey conducted by the Bureau of Statistics on behalf of the Department. Details of this Survey are found in section 5 of this Report.

In 1988, consideration was given to developing a model for a statistical data base to accurately monitor industry performance including tourist visitations and expenditures. This model will be developed in 1989 and will use the methodology of the 1987 Yukon Visitor Exit Survey. When this data base has been developed the Branch will publish more detailed information regarding total visits and expenditures in future Yukon Tourism Industry Highlights Reports.

Focus Groups

Focus group testing was also done by the Branch to test the reactions of qualified consumers to the Yukon's tourism literature. Since publications are prepared a year in advance; testing done in 1986 on the 1987 literature campaign resulted in modifications of the 1988 literature.

In 1988, focus groups were conducted in three Canadian and three U.S. cities to test the 1988 literature. The results of these focus groups were used in the preparation of the 1989 literature campaign.

Coupon Conversion Study

A research project done in 1987 was the 1987 Yukon Coupon Conversion Study. This annual study provides information about the behavior of those individuals who request information directly from the Department of Tourism. The 1988 Coupon Conversion Study will be completed in early 1989.

Heritage Branch

The Heritage Branch focuses on increasing public awareness of the Yukon's history, heritage resources and contemporary art. The Branch functions to protect and manage the territory's heritage resources and heritage sites and objects. It assists local societies and Native groups in reaching their heritage objectives.

The Branch conducts four major categories of programs: local museums development, historic sites development, heritage artifact and art acquisition and heritage/cultural research.

In addition to these programs, the Branch, in 1988, continued developing the Historic Resources Act, participated in activities of the Yukon Geographic Names Board and issued scientists and explorers licenses. Key input was provided to the development of the sub-agreement on heritage that formed part of the Yukon Land Claims Agreement.

The Branch also provides funding and technical assistance to all Yukon museums in developing and upgrading their staff and programming to meet national museological standards.

Conservator

In 1988, a conservator was hired, adding more assistance in such areas as staff training; artifact care and their handling, storage and display. Funding assistance to create this position was received under the National Museums of Canada's Conservation Assistance Program.

Two workshops were conducted in 1988 in conjunction with Canadian Conservation Institute staff on museum opening/closing procedures and mannequin construction and use.

A museums handbook was also prepared in late 1988 and is scheduled for release in 1989. In 1988, work began on developing a conservation policy and strategy. As well, in 1987, National Museums of Canada transferred one of their surplus mobile conservation vans to the Yukon.

Lord Report

In 1987, the Lord Report on museum development in the Yukon was presented and extensive consultations occurred with the museums, the Yukon Historical and Museums Association and the Council for Yukon Indians.

A preliminary draft of a Yukon museums policy was prepared in 1988 and reviewed by the museums.

Museum Grants and Contributions

In 1987 and 1988, funding was provided to all Yukon museums to upgrade the efficiency of their operations. The projects undertaken ranged from the purchase of photocopiers and projectors, to the construction of exhibit cases and the publication of a local history book.

Major Museums Development

Planning continued in 1987 and 1988 on ways to upgrade and expand museum facilities. Seed money is provided by the Heritage Branch under its Major Museums Development Program which enables the museums to attract additional funding from other sources in order to complete their projects. Details of the projects started for each museum are noted under Regional Initiatives.

Currently, the following Yukon museums are operating: the MacBride Museum and the Old Log Church Museum in Whitehorse, the Kluane Museum of Natural History in Burwash Landing, the Keno Mining Museum in Keno City, the George Johnson Museum in Teslin and the Dawson City Museum in Dawson City. Museums are under consideration for Old Crow and Watson Lake and a transportation museum is being planned for Whitehorse.

Historic Properties Assistance Contributions

Under its Historic Properties Assistance Contributions (HPAC) program, the Branch works with private individuals, organizations, Indian bands and industry in the preservation and development of the Yukon's historic sites.

Seven projects in 1987 and in 1988 were provided HPAC funding assistance for various activities ranging from replacement of the siding for the Keno City Hotel to stabilization measures for the Little Salmon Cemetery.

Fort Selkirk

In 1987 and 1988, the Heritage Branch continued work on a major historic sites development project at Fort Selkirk. Discussions were begun with the Fort Selkirk Indian Band on ways to develop a master plan for future development activity on this site. Preparation of this master plan is scheduled for 1989. In 1988, the Indian band assumed responsibility for managing the on-site activities involved in this project.

S. S. Tutshi

In 1987, a general overall plan was prepared for the restoration of the S.S. Tutshi, located at Carcross. Preservation work on the sternwheeler was continued in 1988.

Also in 1988, for the first time, the boat was opened for public tours conducted by the Carcross Visitors' Reception Centre. Approximately 5,500 people took tours of the S.S. Tutshi during seven weeks in the summer of 1988.

Herschel Island

The Historic Sites Development project on Herschel Island was continued in 1987 and 1988.

A detailed analysis was started of the historic buildings on the island as part of its development as a historic park under the terms of the Inuvialuit Final Agreement.

Restoration and stabilization work on these buildings continued in 1988. As well, an Inuvialuit cultural study was initiated along with historic archival research. In addition, the Departments of Tourism and Renewable Resources started development of a complete park interpretive program.

Heritage Inventory

In 1987, the second phase of the Yukon Heritage Inventory project was initiated to provide the background research, recording of selected areas and preliminary evaluation of significant heritage sites in the Yukon.

This project will enable the Branch to evaluate and to set priorities for future historic sites preservation and development projects. Phase two was completed in 1988 with completion of approved work on the Inventory due by 1991.

Territorial Art Gallery

Another function of the Branch is to manage the Territorial Art Gallery located in the main Yukon Government Administration Building in Whitehorse. Under this function, the Branch handles ongoing provision of contemporary art exhibitions, public information programs, preservation of the Yukon Permanent Art Collection and secretariat services to the Friends of the Gallery Society.

In 1987, five pieces of art were added to the Permanent Collection and, in 1988, seven pieces of art were purchased for this Collection.

In 1988, a new art initiative by the Branch was coordinating the art competitions to obtain works for the Andrew Philipsen Law Centre. Thirty two works of art were commissioned and put into place. In 1989, works will be commissioned for the new Yukon College campus.

Archaeology

Another function of the Heritage Branch involves managing the Yukon's archaeological responsibilities. Since 1985, the Branch has focussed on North Coast heritage resources, utilizing funding provided by the federal Northern Oil and Gas Action Program.

In 1987, the Branch continued to administer the archaeological research permitting system and carried out additional excavation and inventory of archaeological sites on Herschel Island and the mainland coast. As well, excavation of an early 20th century whaling house at Pauline Cove was completed.

In 1988, the Yukon Archeology Program was established. The function of this program is to protect the Yukon's archeological resources from various land-altering activities and to undertake or manage specific research projects related to capital developments by Yukon government departments.

In 1988, a site information mapping project for the Kluane Regional Land Use Plan was done and a study of traditional land use sites was initiated for the Dempster highway corridor.

Heritage/Cultural Research

In 1988, the Branch began to assist individuals, heritage groups and Indian bands in carrying out heritage studies and research to ensure the Yukon's oral and written heritage is preserved. In 1988, five major historical heritage studies were undertaken in the communities of Old Crow, Watson Lake, Whitehorse and Burwash Landing. In addition, in 1988, the first international Northern Storytelling Festival was held in Whitehorse.

Marketing Branch

The Marketing Branch works to increase the number of visitors who choose the Yukon as a vacation/pleasure destination and to encourage them to extend their stay in the territory.

The Marketing Branch operates four main categories of programs: advertising campaigns, public relations/publicity, promotions and information services. Some of the key new activities undertaken by the Branch in 1987 and 1988 are noted below.

Japanese Tourism Mission

In 1987, a Yukon Tourism Mission went to Japan to continue the Department's ongoing efforts to penetrate the Japanese tourism market.

Sixteen major Japanese tour wholesalers were contacted and encouraged to include the Yukon in their Canadian tour programs. A total of 75 operators and wholesalers participated in the Yukon promotions. The staff of the Canadian Embassy in Tokyo and Canadian Airlines International Limited in both Tokyo and Osaka actively supported the mission.

Since that time, a number of new Japanese group tours visited the Yukon and eight wholesalers participated in familiarization tours in the Yukon.

Yukon Image Campaign

In 1986-87, to complement the Yukon's joint advertising campaign with Alaska, the Yukon Image Campaign was instituted to generate increased awareness of and interest in the Yukon as a vacation destination among consumers in Western Canada and Ontario. A free, long distance 800 telephone number for enquiries was put into place in 1987.

In 1988, this Yukon Image Campaign received a Western Canadian Sales and Marketing Award of Distinction for Excellence in Advertising in the Best Magazine Category. Slogans for the advertisements were: Last of the Big Time Splendors, and Room At The Top.

Film Promotion Program

The Film Promotion Program was approved in the 1986-87 fiscal year, allowing advertisements to be placed in key U.S. and Canadian film industry media to promote the Yukon as a viable site for feature film shoots, documentaries and TV commercials.

In 1987, the Branch developed a promotions video on Yukon film locations and joined the Association of Film Commissioners. The Yukon Film Production Guide was also prepared in 1987 and a 12 page pamphlet providing visual overview of the Yukon's film potential was published in 1988.

As part of the Film Promotion Program, the Marketing Branch annually participates in the Locations Expo held in Los Angeles. As a result of this promotion, the Branch secured one TV movie which was filmed in Dawson City in 1987 and four television commercials were made.

Yukon Tourism Film

A new tourism film on the Yukon was produced in 1986-87 and is being distributed in the U.S., Canada and overseas. A short version of the film and versions in German, French and Japanese were produced in 1987-88. In 1987, this film won an international award for Best Cinematography of a Tourist Destination at the prestigious Tourism Film Festival in Czechoslovakia. It was selected from over 120 entries in this category.

Good Host Campaign

In 1986-87, an advertising campaign was begun to encourage visitors' to use Yukon businesses identified as Good Hosts who are committed to providing a friendly welcome, value for money and fair exchange. Also during this time advertisements were placed to encourage Yukon businesses to participate in this program and to attend special training programs.

Publicity Activities

As part of the Marketing Branch's publicity activities, press kits are mailed out to selected media in North America and Europe. In 1987, 200 press kits were sent out. In 1988, 280 press kits were mailed out, for the first time including feature articles and photos.

As well, in 1988, a press clipping book analyzing 1986-87 press coverage was produced. The value of this publicity was estimated at more than $500,000.

Visiting Media Program

As part of the Branch's ongoing Visiting Media Program, 20 writers per year are invited to visit the Yukon and to write travel articles on their experiences. This activity has been a key marketing tool in the U.S. in the absence of a U.S. advertising campaign.

Consumer Promotions

The Branch is involved in planning and evaluating the consumer promotions conducted by the Tourism Industry Association of the Yukon. Details of this activity are noted under Industry Initiatives.

Travel Trade Promotions

The Branch also has an ongoing program to promote the Yukon to tour wholesalers, tour operators and travel influencers. Major promotions are presented through such forums as the National Tour Association and Rendez-vous Canada.

Another important tour promotion activity is providing training seminars to travel counsellors in Canada and in the U.S. on an annual basis. Seminars are conducted for automobile club travel counsellors and their training personnel as well as travel agents in the Yukon's key markets.

In 1987, U.S. seminars were presented in California, Colorado, Utah, Texas, Washington and Oregon. In 1988, seminars were conducted in these states as well as in Georgia and Florida. In Canada, during 1987, seminars were held in B.C. and Alberta and, in 1988, in B.C., Alberta and Ontario.

Familiarization tours of the Yukon are also provided to selected tour operators.

Tour Data Base

A new initiative for the Marketing Branch in 1988 was to build a data base of all North American tour operators' and their intentions with regard to sending tours to the Yukon.

A mail survey was conducted. 92 U.S. and 31 Canadian operators responded that they were planning tours to the Yukon in 1989. This information will assist the local tourism industry in ensuring that Yukon attractions are included by these operators in their tours. This data base will be updated and expanded on a regular basis.

Joint Government Promotions

Joint promotions with other governments are an integral part of the Branch's activities. These joint promotions allow the Branch to generate greater public or travel trade awareness of the Yukon than the territory can accomplish on its own.

The Branch's major government promotions involve the Yukon Tourism Marketing Council and the Alaska Tourism Marketing Council. Additional promotional activities have involved Alberta, B.C, and the N.W.T., under the Canada West banner. Other joint initiatives have taken place with the Canada Tourism Council of Australia.

The details of the initiatives undertaken with the Yukon Tourism Marketing Council and the Alaska-Yukon Marketing Council are found under Joint Initiatives.

In 1987, two trips to Europe were undertaken to promote the Yukon's tourism facilities and attractions in Austria, Switzerland and Germany. During these two trips over 150 meetings were held with tour wholesalers, airline management, trade consuls and media representatives. Attending the Berlin International Tourism Exchange in the March of 1987 was one of the major highlights of these trips to Europe.

The Canada Tourism Council of Australia annually stages Corroboree, a series of seminars geared to informing Australian travel agents about Canada's travel opportunities. In 1988, the Tourism Industry Association of the Yukon participated in Corroboree on behalf of the Branch and made presentations in Perth, Melbourne, Sydney and Brisbane to a total audience of over 1,000 Australian travel agents.

Partners in Tourism Program

In 1987, a new Partners in Tourism Program was developed. The program provides financial assistance, on a cost-shared basis, to Yukon communities,

tourism associations and businesses for the development and implementation of local or regional tourism marketing programs. In 1987 and 1988, 16 applications for assistance were approved.

Information Services

The Branch's Information Services activity includes the entire visitor enquiry and response function, bulk distribution of literature and the selection, training and supervision of the visitor reception centres staff in Watson Lake, Whitehorse, Carcross, Haines Junction, Beaver Creek and Dawson City.

Consumer Literature

The production of consumer literature is a major function of the Branch and the Branch works closely with the Literature Sub-Committee of the Yukon Tourism Marketing Council on the design of publications.

In 1987-88, a new approach was followed in the preparation of the 1989 Vacation Guide. Based on the feedback received from several focus groups testing their response to earlier versions of the Guide, the 1989 Guide was printed in a four-colour format with heavier paper and glossy cover stock. This is the first time the Vacation Guide has been produced to such high quality, professional standards.

In 1988, a Yukon Highway Touring Guide was published with an eight page section on B.C. This Touring Guide was designed for distribution to dedicated visitor prospects who are travelling to Alaska by road in 1989. It was used as an integral part of the Alaska-Yukon Marketing Program.

Trade Literature

A Yukon Tour Planner providing specific information on the Yukon of interest to tour operators is published annually. As well, for the first time in several years, four new posters were produced in 1988 for use by travel agents and tour wholesalers in promoting tourism in the Yukon. 2,500 copies of each poster were printed.

Video Laser Discs

In the summer of 1988, an inter-active, information and entertainment video program was transferred to laser discs for use in each of the visitor reception centres.

In the summer of 1989, this laser video system will be expanded, enabling visitors to view selections which highlight a variety of non-competing private and public sector attractions throughout the Yukon.

Public Service Announcements

Included in the production of these videos in 1988 were three different public service announcements created on the themes of Yukon Indian culture, Yukon wilderness and the Klondike Gold Rush.

A 30 second and a 60 second version of each announcement was produced and will be distributed in 1989 to selected TV stations in Canada and the U.S.

Visitor FM Radio

In 1988, low frequency radio transmitters were installed in the visitor reception centres to transmit a visitor-related FM radio program.

This program included commentary on highway reports, local interviews and information on attractions and events within the immediate vicinity of each centre. Businesses mentioned on this program noticed a dramatic increase in visitors to their establishments.

Travel Counselling

The Marketing Branch's travel counselling function provides factual, personalized information to unsolicited enquiries for information on the Yukon.

From October 1, 1987 to October 31, 1988, over 14,600 unsolicited enquires were handled either by mail, telephone, telex or in person. In 1987, new office systems were developed to increase the Branch's efficiency in responding to these enquiries.

V. Monitoring Trends

Evaluating the effectiveness of the actions being taken to promote tourism is an important part of assessing the state of the tourism industry in the Yukon. The Department of Tourism monitors the factors affecting these actions and collects relevant statistics on them as well as on visitor behavior. This section focuses on major new statistical information compiled during 1987 and 1988. It also reviews the external factors influencing tourism in the Yukon and changes in the marketplace.

Trends in the U.S. Market

Longer-term trends with respect to the U.S. market have an influence on the development of tourism in the Yukon.

The following is a summary of an article published by the Conference Board of Canada in its January/February, 1989 edition of their Tourism in Perspective newsletter.

Population

A large number of Americans, born during the "baby boom" years, are approaching their mid 40s. Since this age group is considered a prime, flying-age group, overseas travel by Americans is expected to grow by almost 5% in 1989. Conversely, U.S. travel to Canada, most of which is by automobile, is expected to grow by only 1%.

Family Income, Size

The two-income American family is now the norm. Only 7% of U.S. households can be considered a traditional family unit. With both parents having to juggle work schedules; time, rather than money, is often the determiner in choosing vacations.

As a result, Americans appear to be taking shorter trips on a more frequent basis. If this trend continues, it is expected that Canada will see a corresponding decrease in the traditional touring family travel market. Other factors affecting this market are the trend toward smaller families and for parents and children to have separate vacations.

Retirement Migration

As more Americans reach retirement age, the trend is to migrate toward the warmer, southern states, moving further from Canada. These areas of the U.S. are also highly competitive over the tourism products Canada has to offer.

Focus on Cities

America's aging and shifting population, with its tendency to take shorter trips, has affected the bus tour market. This market is increasingly becoming a fly/bus market. Itineraries are also changing with a focus on taking short day trips from one place rather than travelling to a new place every night or two. Thus, bus tours are likely to be increasingly attracted to cities where a variety of entertainment and shopping experiences are available with good opportunities for short day trips.

U.S. Market Profile

The profile of the U.S. market showing greatest interest in a Canadian city visit is middle-aged and college-educated people, living in an urban centre. The people in this profile are an active group, interested in visiting places others have not seen. They appear to have a high interest in cultural activities and ethnic events rather than in nightlife and entertainment.

Despite these changes, Canada remains well-positioned to capture a growing share of this market. Key to this will be a refocusing of the tourism activities being offered to cater to this growth market for Canada.

External Factors Influencing Tourism in the Yukon

Tourism is an international industry that has experienced rapid growth over the last century. Those countries most affected by this trend are developed countries. Most tourism is, in fact, taking place in and between the developed countries, particularly those like Canada, which are adjacent to major markets such as the United States. (1)

Although Canada's tourism industry internationally continues to grow, over the past decade, a decline in Canada's world market share is evident. Travel markets are changing, consumers are becoming more sophisticated and U.S. competitors are becoming more aggressive.

(1) Butler, R.W. (March, 1986) "The Impacts of Tourism: Divots, Depression and Dollars," Tourism and the Environment Conflict or Harmony?, Alberta Chapter of Canadian Society of Environmental Biologists Symposium, page 75.

Most tourists making travel decisions want unique, quality experiences which provide them with value for the money they spend. These wants provide the industry with a focus upon which to develop marketing plans and a basis for planning new attractions and events.

Tourism is, however, a complex, competitive industry subject to many economic, social and political influences. This susceptibility sometimes creates unanticipated local, national and international impacts which are beyond the control of the industry.

In the Yukon's case, external factors such as the strength of the U.S. currency, international terrorism, political events, changes in other government's programs, development of new destinations or travel trends and adverse weather have had a clear effect on the numbers of visitors coming to the territory in recent years.

The 1988 border crossing statistics for the summer tourism season reflected a 9.3% decline from 1987 in the number of visitors crossing Yukon borders.

Several factors were identified in the January, 1989, Yukon Economic Forecast as possible causes for this shift.

- More tourists travelled to Europe as the U.S. dollar strengthened and terrorist threats declined.
- Americans tended to travel less during an election year.
- Alaskan government tourism promotional expenditures declined.

- Princess Tours terminated some cruises at Whittier, Alaska rather than at Skagway. This meant a loss of bus tour traffic and bed nights to the Yukon.

- Increased demand from travellers for longer cruises with less time for land tours.

- The White Pass and Yukon Railway resumed operation only as far as the U.S.-Canada border, resulting in a substantial drop in visitors to Carcross on one-day bus excursions.

- Heavy rains washed out portions of the Alaska Highway in July and the reporting of this around North America deterred potential visitors.

Some of these factors, such as the decline in cruise ship traffic, reflect the long-terms trends in the U.S. marketplace noted previously. These factors likely will be of longer duration and will require realignments in the Yukon's tourism industry to serve these customers' new wants. The planning and diversification efforts undertaken during 1987 and 1988 by the tourism industry and the federal and Yukon governments will greatly assist this process.

Yukon Visitor Exit Survey

From June 1 through mid September 30, 1987, the Yukon Bureau of Statistics conducted a non-resident travel survey on behalf of Department of Tourism. Statistics Canada contributed to the survey design and methodology. The majority of the funding was obtained from the Canada-Yukon Tourism Sub-Agreement.

This is the first statistically sound, definitive survey of visitors to the Yukon undertaken so far by the Yukon government. Until this survey, limited visitor information had been available from previous studies which provided an ad hoc estimation of tourism activity.

The primary survey design was to measure the total number of visitors to the Yukon, how much they spent while here, how long they stayed, where they came from, where they went, what they did and their primary mode of travel.

As well, details were obtained on the travellers themselves and on their attitudes and perceptions about the Yukon.

An innovative approach was adopted to present the information obtained and to improve its relevancy. Standard profiles were developed and applied to the tourism regions in the Yukon. Travel paths were identified which related tourists to well identified travel behavior while in the Yukon.

In 1988, parts I and II of the 1987 Yukon Visitor Exit Survey were made public. Part I examines the Survey's results and part II explains the methodology used. Part III which assesses visitor attitudes and perceptions about the Yukon is scheduled for release in 1989.

Copies of the 1987 Yukon Visitor Exit Survey are available from the Department of Tourism. A summary of the Survey's key findings follows:

Main Results

- An estimated total of 88,500 travel parties or 193,700 individuals visited the Yukon during the summer of 1987.

Table 1: Summary of Main Results of the 1987 Yukon Visitor Exit Survey

Total	No. of all Parties	88,455
	No. of all Visitors	193,708
	Expenditures (Can. $)	$37,287,111
Average	Party size	2.2
	Nights spent	4.3
	Expenditure/party/visit (Can. $)	$422
	Expenditure/person/night (Can. $)	$ 45

Visitor Profile (% of all visitors)

Origin of Party:	Canada	17
	USA	79
	Other	4
Mode of Last Exit:	Highway	59
	Bus	35
	Air	6
Purpose of Trip:	Business	9
	Pleasure	86
	Both	5
Expenditures/person/night:		
	$1 to $25	24
	$25 to $50	23
	$50 to $75	24
	$75 to $100	18
	$100+	12
Vehicle Type:	Car/truck/van	28
	Camperized/Trailing	19
	R.V.	11
	Other	0
	Bus	35
	Air	6

- These visitors spent approximately $37 million in direct expenditures made while in the Yukon. This figure does not include expenditures covered by pre-paid travel arrangements and travel to the Yukon.

- The average length of stay in the Yukon was 4.3 nights with each person spending an average of $45 per night.

- A breakdown of visitors by country showed that 79% were Americans, 17%, were Canadians and 4% were from other countries.

- Most visitors, 59%, exited the Yukon by the highway in a private vehicle, while 35% left by bus and 6% by air.

- Of those visitors using a private vehicle, 28% exited by car, van or truck, while 19% used a camperized vehicle or pulled a trailer. Recreational vehicles or motor homes were used by 11%.

- Most visitors, 56.9%, were from 40 to 69 years of age, with 30.6% being from 60 to 69 years.

- The vast majority of people, 91%, cited the purpose of their trip to be pleasure or business and pleasure. Only 9% identified business as their primary purpose.

Table 1 provides more details of the main results of the Survey.

Regional Visitations

- Whitehorse and the South Alaska Highway area was the area most visitors actually stopped in for a tourist-related activity. Of all the visitors to the Yukon in 1987, 77% stopped in this area.

- The second area most visitors stopped in was the Kluane and North Alaska Highway area with 44% of the Yukon's visitors.

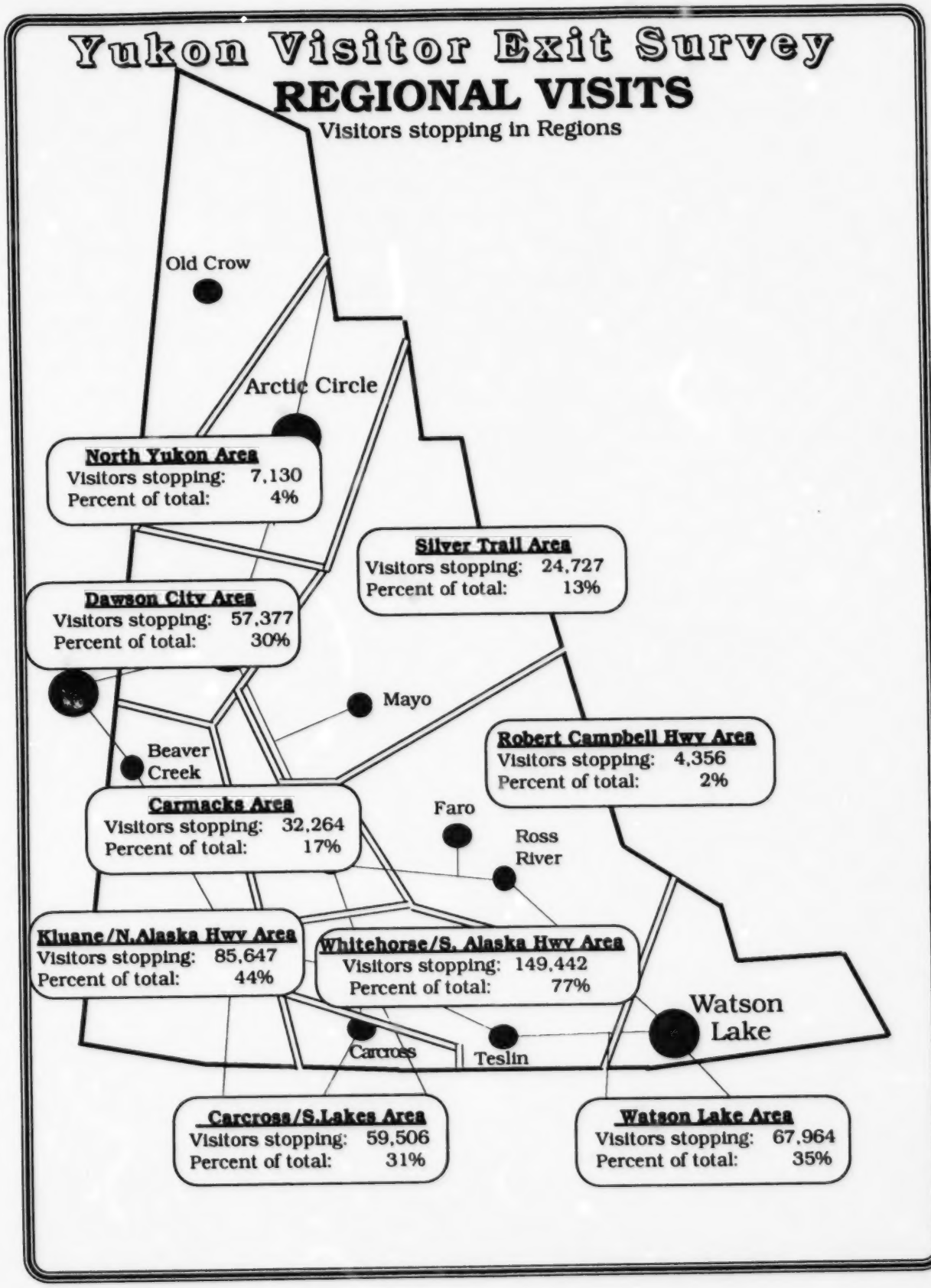
- Watson Lake area received 35% of the visitors who stopped in a region; Carcross/Southern Lakes area, 31%; while 30% of all visitors stopped in Dawson City.

The following map displays this information on a regional basis.

Yukon Visitor Exit Survey

REGIONAL VISITS

Visitors stopping in Regions



Yukon Border Crossing Statistics

Border crossing statistics for the peak summer tourist season are calculated on the basis of the number of people who cross at any of the four Canada Customs entry points in the Yukon: Beaver Creek, Pleasant Camp (Haines Road), Fraser (Skagway Road), and Little Gold (Top of the World Highway near Dawson City). They are processed for the Department by the Yukon Bureau of Statistics.

In 1987, the process for collecting these statistics was changed to focus on non-residents and to separate returning Yukoners and commercial truck crews. As such, it is no longer appropriate to compare border crossings figures obtained prior to this change.

Overall, from 1987 to 1988 there was a 23.8% decline in the number of bus passengers crossing the Yukon border. This was due in part to a loss of cruise ship passengers to the new attraction of the White Pass and Yukon Railroad train excursion, reducing the number of visitors who were cruise-only passengers taking a one-day bus excursion from Skagway to Carcross.

In addition, Princess Cruises' decision not to terminate most of their ships at Skagway reduced the number of cruise/tour passengers carried through the Yukon by Princess Tours' buses.

The number of private vehicles crossing the border saw a 3% reduction from 1987 to 1988.

In 1987, 84.3% of the people crossing the Yukon border were Americans, 10.9%, Canadians, and 4.8% from other countries. In 1988, these proportions remained relatively stable with some minor changes. In 1988, Americans accounted for 85.4% of the crossings, Canadians, 9.3% and other nationalities, 5.2%.

Comparing the total number of visitors crossing Yukon borders from 1987 to 1988 there was a 9.3 percent decline. In 1987, there were 199,593 crossings and, in 1988, there were 180,990

See Tables 2 and 3 for more information.

Table 2: Yukon Border Crossings, June to September

1987 - Bus Passengers

	Cdn.	U.S.	Other	Total
Beaver Creek	1,705	17,033	241	18,979
Pleasant Camp (Haines Junction)	124	1,284	--	1,408
Fraser (Skagway Road)	1,994	34,252	213	36,459
Little Gold (Top of the World Highway near Dawson City)	905	2,493	464	3,862
1987 Total	4,728	55,062	918	60,708

1988 - Bus Passengers

	Cdn.	U.S.	Other	Total
Beaver Creek	660	13,447	1,014	15,121
Pleasant Camp (Haines Road)	17	1,141	126	1,284
Fraser (Skagway Road)	1,169	22,878	1,980	26,027
Little Gold (Top of the World Highway near Dawson City)	581	2,907	318	3,806
1988 Total	2,427	40,373	3,438	46,238

Table 3: Yukon Border Crossings, June to September

1987 - Total Persons

	Cdn.	U.S.	Other	Total
Beaver Creek	7,384	82,897	2,887	93,168
Pleasant Camp (Haines Road)	1,725	15,549	828	18,102
Fraser (Skagway Road)	9,388	56,249	3,810	69,447
Little Gold (Top of the World Highway near Dawson City)	3,206	13,646	2,015	18,867
1987 Total	21,703	168,341	9,542	199,586

1988 - Total Persons

	Cdn.	U.S.	Other	Total
Beaver Creek	5,358	79,048	3,202	87,608
Pleasant Camp (Haines Road)	847	16,592	822	18,261
Fraser (Skagway Road)	7,624	43,390	3,460	54,474
Little Gold (Top of the World Highway near Dawson City)	3,084	15,586	1,977	20,647
1988 Total	16,913	154,616	9,461	180,990

Yukon Visitor Attractions

Statistics are also kept to monitor visitor attendance at the Yukon's major tourist attractions during the summer tourism season.

Table 4 provides this information for 1986, 1987 and 1988.

Table 4: Attendance at Yukon Visitor Attractions, June to September

	1986	1987	1988
Canadian Parks Service, Whitehorse			
S. S. Klondike Tours	36,378	37,211	41,190
Chilkoot Trail	1,596	1,570	1,695
Canadian Parks Service, Dawson City			
Palace Grand - Day	15,765	16,596	20,786
Palace Grand - Follies	19,134	22,515	21,998
S.S. Keno	11,139	14,667	15,053
Robert Service Cabin	12,387	14,939	15,134
Old Post Office	10,201	14,300	11,094
Dredge #4	18,864	19,728	19,628
Harrington's Store	5,311	6,334	7,188
Canadian parks Service, Kluane Park			
Sheep Mtn. Info Centre	35,940	33,244	32,637
Registered Overnight Visitors (Backpackers)	963	531	333
Kathleen Lake Campground	974	3,223	3,012
Haines Junction Interpretive Centre	46,987	39,716	39,033
Yukon River			
Fort Selkirk	658	795	600
Carcross			
S.S. Tutshi Tours	N.A.	N.A.	5,500
Museums			
MacBride, Whitehorse	25,000	18,623	19,855
Dawson City	10,000	10,000	14,986
Kluane Museum of Yukon	15,000	14,087	17,020
Natural History Teslin	2,000	3,000	927
Old Log Church, Whitehorse	4,000	3,584	3,856
Keno Mining Museum	1,000	1,033	1,000
Yukon Historical Museums Association Walking Tours	1,000	800	515

VI. Conclusion

The Yukon's tourism industry is an important contributor to the territory's overall economy. As this Tourism Industry Highlights Report shows, many key initiatives were put into place in 1987 and 1988 to plan the development and diversification of this industry over the next decade.

Crucial components of this framework have been the preparation of the Yukon Tourism Action Plan and the many initiatives undertaken by individual associations, Indian bands, local communities and private businesses.

Essential, as well, has been the support of the federal and Yukon governments through various programs offering marketing assistance, development funding, training and technical assistance for the Yukon's new tourism attractions and its heritage resources.

New ways of servicing our visitors are being developed. All regions are involved and benefiting from these initiatives. Planning is underway for the 50th Anniversary of the Alaska Highway and the Klondike Gold Rush Centennial.

The effectiveness of these activities are regularly monitored and the methods of monitoring are updated frequently. The 1987 Yukon Visitor Exit Survey set a benchmark for providing sound statistical information on the actions and views of visitors to the Yukon. New trends in the Yukon's markets are also watched carefully and assessed for their impact on the industry.

Some trends in the U.S. market are creating shifts in the Yukon's tourism industry. Comparing the total number of visitors crossing Yukon borders from 1987 to 1988, there was a 9.3% decline. Many factors beyond the control of the Yukon tourism industry and the government influenced this decline.

In 1987 and 1988, however, a new foundation was laid for the future of tourism in the territory which gives the Yukon a strong base to meet the challenges facing the tourism industry into the 1990s.